Workload Data & Systems

Workload Data & Systems Purpose

- Assess the availability of workload data, work units, quantifiable outputs of activities or processes, agency or industry performance standards, and other similar data. Establish data collection systems as necessary.

- What can you do?

- What can’t you do?

Workload Data & Systems

- **Evaluate workload data for:**
  - Availability
  - Reliability
  - Timeliness

Workload Data & Systems Where to Begin

- Outputs
- Work Unit(s)
- Source of count
- Historical records
- Directed requirements
- Workload volume
- Frequency of occurrence
- Backlog
- Recurring/One-time

Baseline Costs

Baseline Costs

“Determine the activity’s baseline costs as performed by the incumbent service provider.”

- As is costs of the organization
  - COMPARE lines 1-6
- Used to determine savings
- Retrieve data from collection team
- Line rationale and supporting documentation

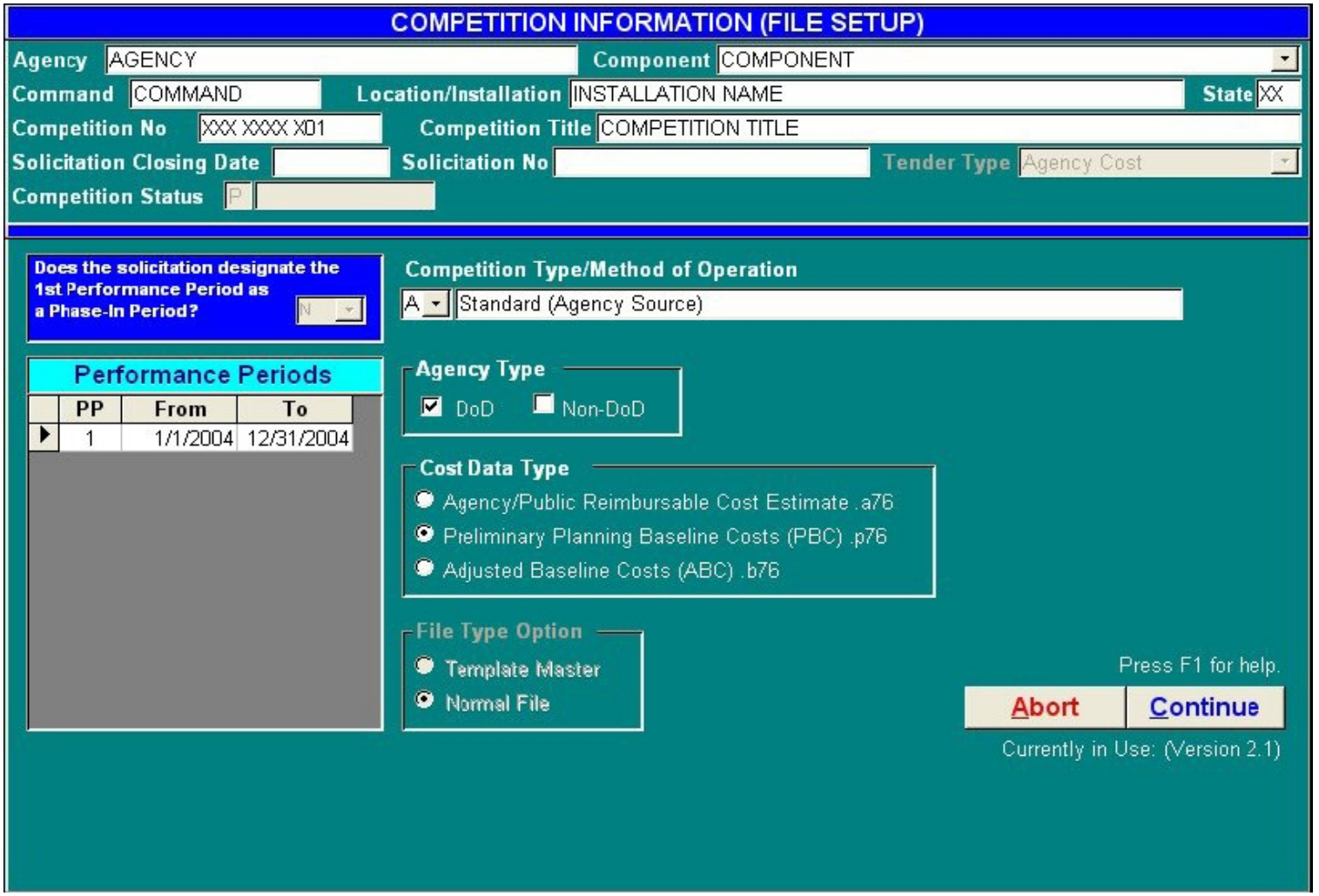
Baseline Costs

- **What is COMPARE**
  - Mandatory!
- **Mevatec Website** (http://www.compareA76.com)
- **DoD Costing Manual**

Baseline Costs

- **COMPARE Inputs:**
  - Line 1: Personnel (GS, FWS, NAF, Military, FN)
  - Line 2: Material and supplies
  - Line 3A: Capital Equipment and facilities
  - Line 3B: Minor items
  - Line 3C: Rental costs
  - Line 3D: Travel costs
  - Line 3E: Subcontract costs
  - Line 3F: Utility costs
  - Line 5: Additional costs

Baseline Costs



Baseline Costs

- **Documentation:**
  - Line 1: Pay/wage tables, PDs, UMD, etc.
  - Line 2: IMPAC records, purchase records
  - Line 3A: Inventory records w/acquistion and MX info
  - Line 3B-F: Inventories w/price, a/o date, MX info
  - Line 3E: Price, industry code, CMEs

Baseline Costs

- **COMPARE Notes:**
  - Study information screen:
    - Performance periods
    - Phase in period box
  - Lines 1,2, 3 ,and 5
    - GFP, EPA, Ins . . . Leave at default settings
    - QTY for only one PP

Baseline Costs

- COMPARE lines 1-6
- All costs captured—this can be extensive
- Tips
- Start the audit trail

Baseline Costs

- **Baseline Costing Official**
  - PWS Team Leader
  - Member or advisor to PWS Team

- **Baseline costs made available to public**
  - One week after announcement

Baseline Costs

Department of Defense
Competitive Sourcing Program

SUBJECT: Baseline Costing For Public-Private Competitions

BASELINE COSTS REPORT: PRELIMINARY PLANNING BASELINE COSTS

Agency: DEPARTMENT OF DEFENSE
Agency Component: Washington Headquarters Service
Competition Number: 123456
Competition Title: Pest Management
Competition Location: PENTAGON, ARLINGTON, VA
Competition Type: STANDARD COMPETITION

Performance Period		Line 1 Personnel Costs	Line 2 Material and Supply Costs	Line 3 Other Specifically Attributable Costs	Line 4 Overhead Costs	Line 5 Additional Costs	Line 6 Total Cost of Performance
1	10/1/2003 - 09/30/2004	1,905,865	6,923	202,047	228,703.8	13,845	**2,357,384**
Totals		**1,905,865**	**6,923**	**202,047**	**228,703.8**	**13,845**	**2,357,384**

PRELIMINARY PLANNING BASELINE COSTS CERTIFICATION BY BASELINE COSTING OFFICIAL I certify that, to the best of my knowledge this Preliminary Planning Baseline Costs Report and its supporting documentation (e.g., COMPARE file, source documents, working papers, data sources, and written rationale): (a) will be included in the competition file, (b) is accurate and calculated in accordance with the Circular and DoD Baseline Costing Policy and (c) reflects and estimate of the government's baseline costs for operating the commercial activities included in the scoping and grouping decisions made during preliminary planning for the public-private competition. I further certify that I will not participate in this public-private competition as, or advisor to, the agency tender official; as a member of, or advisor to, the most efficient organization (MEO) Team; or by assisting with the development of any aspect of the agency tender (e.g., MEO, agency cost estimate).

Baseline Costing Official's Signature: **Date:**

Printed Full Name: *Title:* *Phone #:*
Agency (Component):

NOTICE: BASELINE COSTS DO NOT REFLECT BUDGET, RESTRICTED, PROCUREMENT SENSITIVE OR OTHER INFORMATION RELATED TO THE AGENCY TENDER COST ESTIMATE

Cost Data & Systems

Cost Data & Systems

- **Cost data & collection system**
  - Needed for baseline costs
  - Develop a data collection system
    - Mirror worksheets after COMPARE line entries
    - Training
    - Assess the collection system
    - Validate and maintain the data

Cost Data & Systems

- **COMPARE line entries:**
  - Line 1: Personnel Costs
  - Line 2: Material and Supply Costs
  - Line 3A: Capital Equipment and Facilities
  - Line 3B: Minor Items
  - Line 3C: Rental Costs
  - Line 3D: Travel Costs
  - Line 3E: Subcontract Costs
  - Line 3F: Utility Costs
  - Line 5: Additional Costs

Sample Data Collection Worksheets

Line 3B: Minor Items:

Item	Location			Year Built/ Installed	Manufacturer	Model	Fed Stock Number	Unit Price	Current Condition
	School	Bldg. #	Room						
Giessen ES									
Supply and Exhaust ventilation Systems: Absaug- bzw. Abluftanlagen (Werkstätten, Toiletten etc.Eng, Mechanical rooms and Restrooms.)	GES	6302			Absaugung der Toiletten durch Deckenlüfter Miniventz 9, Miniventz 5				
Ventilation System: Belüftungsanlagen, Ventilation	GES	6302	----	1978	Zentrale Anlage		4140	$15,000	Fair
Fire Alarm System: Brandmeldeanlagen	GES	6302	144	1978	Wartung Schäfer		6350	$5,000	Good
Fuel Oil Boiler 2 each: Eigenständige Heizanlagen/ 2 Ölbrenne	GES	6302	heating room	1996	Giersch	M2.1-Z-L	4420	$8,000	Good
"			heating room	1978	KOMET	DM 90 H/n	4420	$9,000	Good
Intercom System: Interkom-/Lautsprechersysteme	GES	6302	144	1978	Wartung Schäfer		5830	$15,000	Marginal
Air Conditioner: Klimaanlagen	GES	6302	156	2001	Airwell	STXLM14Indor	4120	$3,000	Average
Air Conditioner: Klimaanlagen	GES	6302	218	2001	Airwell	XLM12STDR407C	4120	$6,000	Poor
Central Bell System: Klingelanlagen (Gong, Klingel etc.)	GES	6302	144	1978	Wartung Schäfer		5830	$3,000	Good
Forced Air Heating System: Wärmetauscher (z.B. Luftheizunge	GES	5612	heating room	1986	Apperatebau Weißt		4420	$12,000	Average
Close Circuit TV: CCTV	GES	414	----	1995	none		5820	$1,500	Good
Electrical Operated Blinds: Elektr. Rolläden oder Jalousien	GES	414	Principal	1996	SUN Processor 01		7195	$500	Average
Fire Alarm (Sub)	GES	4572	Library	1996	Esser	3003	6350	$1,200	Good
Intercom System 1	GES	4572	Room 2	1998	Müller	unk	5830	$800	Poor
Intercom System 2	GES	4572	Room 2	1998	Stuble	unk	5830	$600	Poor
Intercom System 3	GES	4572	Room 2	1998	Siedle	unk	5830	$200	Poor
Hainerberg ES									
Disabled Lift 225Kg	HES	07778	1st Floor	2000	Hiro	unk	5999	$1,200	Good
Public Elevator 450Kg 2 Stops	HES	07778	----	1982	WAF	unk	5999	$15,000	Average
Load bearing Elevator 300Kg 2Stop	HES	07778	----	1982	Trepel	unk	5999	$12,000	Marginal
ELA Intercom/ PEA System	HES	07778	Main Office	2000	Leveltech	unk	5830	$900	Good
Clock System	HES	07778	Main Office	1999	Lundes	unk	6645	$1,500	Good
Fire Alarm System	HES	07778	Main Office	1998	Esser	unk	6350	$3,000	Good
Emergency Lighting System	HES	07778	----		Präzisa	unk	6230	$700	Average
Air Conditioner - Split Type	HES	07778	----	2001	Sulic	unk	4120	$800	Good
CCTV	HES	07778	Main Office	2002	Kegami	unk	5820	$1,500	Good
Air Circulation	HES	07778	261	1985	Klima Wolf	unk	4140	$900	Average
Heidelberg Professional Development Center									
AC Unit	HPDC	110/114	610	1999	York	MHC25N16	4120	1500	Marginal
AC Unit	HPDC	110/114	610	1999	York	MOC25N15BD	4120	1500	Marginal

1. **Collect all needed data once – Baseline costing & Tech Exhibits**
2. **Specify details – language, Excel spreadsheet**

Sample Data Collection Worksheets

Preliminary Planning Baseline Costing

Line	Title	Total
1	Personnel Costs	$1,063,490
2	Material & Supply Costs	$7,700
3A	Capital Equipment & Facilities Costs	$37,969
3B	Minor Items Costs	$873
3C	Rental Costs	$8,331
3D	Travel Costs	$1,345
3E	MEO Subcontract Costs	$309,351
3F	Utilities Costs	$80,639
3G	Other Costs	$6,500
4	Overhead Costs (N/A for Baseline Costing)	$0
5	Additional In-House Costs	$1,200
6	**Total Baseline Costs**	**$1,517,398**

Note - The COMPLARE software program will compute many entries automatically; however, all calculations should be accomplished manually on this spreadsheet as quality control check on the COMPARE costing entries.

Sample Data Collection Worksheets

Line 1 – Personnel Costs

GS and FWS Civilian Positions

Position Title	Functional Area	Location	Grade	Step	Salary	EPA	E/M	Pos Type	Entitlmnts	Overseas	FTEs	TOTAL
Giessen ES												
Elementary School Teache	Science	Giessen, GE	GS-09	5	$ 42,374	N	N		$64,933	$25,251	6.7	$604,233
											TOTAL	$604,233

Note: The COMPARE manual must be used for detailed instructions for entering Line 1 Personnel Cost for Baseline Costing. The data for Baseline Costing must be obtained from the components manning document, i.e., the Unit Manning Document (UMD) for the Air Force, Table of Distribution and Allowances (TDA) for the Army, etc.

Non Appropriated Fund and Foreign National Personnel

Position Title	Functional Area	Location	Grade	EPA	Exp	Pos Type	Entlmnts	Basic Pay	Fringe Pay	Other Pay	Overseas Allowance	Total Pay	FTEs	TOTAL
Giessen ES														
Elementary School Teache	German	Giessen, GE	LN-04	N	N		0	$32,451	$14,000	$2,000	$0	$48,451	$6	$271,326
													TOTAL	$271,326

Note: The COMPARE manual must be used for detailed instructions for entering Line 1 Personnel Cost for Baseline Costing. The data for Baseline Costing must be obtained from the components manning document, i.e., the Unit Manning Document (UMD) for the Air Force, Table of Distribution and Allowances (TDA) for the Army, etc.

Military Personnel

Position Title	Functional Area	Location	Service	Grade	EPA	Exp	Comp Acel Rate	FTEs	Total
Giessen ES									
Administrative Assistant	Office of the Principal	Giessen, GE	Army	E-6	N	N	$81,709	2.3	$187,931
								TOTAL	$187,931

Note: The COMPARE manual must be used for detailed instructions for entering Line 1 Personnel Cost for Baseline Costing. The data for Baseline Costing must be obtained from the components manning document, i.e., the Unit Manning Document (UMD) for the Air Force, Table of Distribution and Allowances (TDA) for the Army, etc.

TOTAL BASELINE COST FOR LINE 1 $1,063,490

Sample Data Collection Worksheets

Line 2 - Material and Supply Costs

Item Name	Functional Area	Location	GFP	Source of Supply	EPA	Ins	Inflation Factor	Total Unit Cost	Price Current
Giessen									
Office Supplies	Giessen Elementary School	Administrate Office	N	GSA Catalog	Y	Y	O&M	$6,500	12/15/04
Computer Supplies	Giessen Elementary School	Classroom Support	N	GSA Catalog	Y	Y	O&M	$1,200	6/12/04
							TOTAL	**$7,700**	

Sample Data Collection Worksheets

Line 3A - Capital Equipment & Facilities Costs

Asset Name	Functional Area	Location	MEO Share	Acquisition Cost	Acq Date	Manufacturer*	Federal Stock No.	Useful Life (Years)	Apply Std Factor	GFP	Residual Percent	Residual Value	Maint Costs	EPA	Maint Quantity	Total	Current Condition*
Giessen ES																	
Supply and Exhaust ventilation Systems Mechanical rooms and Restrooms)	Giessen Elementary School	heating room	100%	$45,000	10/25/94	Honeywell	4130-00-336-6732	16	Y	N	25%	$11,250	$389	Y	1	$11,639	
Ventilation System	Giessen Elementary School	heating room	100%	$35,000	09/15/89	Zentral Anlage	4130-00-698-9741	16	Y	N	35%	$12,250	$650	Y	2	$12,900	
Fuel Oil Boiler	Giessen Elementary School	heating room	100%	$23,000	06/18/91	Giersch	4410-00-863-5423	11	Y	N	45%	$10,350	$400	Y	1	$10,750	Good
Air Conditioner	Giessen Elementary School	156	100%	$9,000	06/23/97	Airwell	4120-00-378-6587	10	Y	N	27%	$2,430	$250	Y	2	$2,680	Average
															Total	$37,969	

* Not required for Base Line costing; however, may be required in the PWS.

Sample Data Collection Worksheets

Line 3B - Minor Items Costs

Item Name	Functional Area	Location	Source	Unit Price	Price Current	Federal Stock No.	Useful Life (Years)	GFP	Deprec	Ins	Qty	EPA	Maint Quantity	Total Cost	Current Condition*
Giessen ES															
Fire Alarm System	Giessen Elementary School	GES	GE Retail	$3,500	08/19/04	4210-00-654-3574	14	N	250	Y	1	Y	1	350	Good
Intercom System	Giessen Elementary School	GES	GE Retail	$4,000	7/322/98	5830-00-159-6492	24	N	167	Y	1	Y	1	189	Marginal
Central Bell System	Giessen Elementary School	GES	GE Retail	$4,500	06/25/99	5830-00-842-5462	24	N	186	Y	1	Y	1	199	Good
Central Clock System	Giessen Elementary School	GES	GE Retail	$3,000	06/25/99	6645-00-332-2971	25	N	120	Y	1	Y	1	135	Good
													TOTAL	873	

* Not required for Base Line costing; however, may be required in the PWS.

Sample Data Collection Worksheets

Line 3C - Rental Costs

Item Name	Functional Area	Location			FRN	Price Current	Inflate	Prorate	Qty	Base Year Cost	Current Condition*
		School	Bldg. #	Room							
Giessen ES											
Xerox Machine	Giessen Elementary School	GES	6302	101	N	08/19/04	Y	Y	1	$3,450	New
Cannon Copier	Giessen Elementary School	GES	6302	102	N	7/322/98	Y	Y	1	$4,881	New
									TOTAL	$8,331	

* Not required for Base Line costing; however, may be required in the PWS.

Sample Data Collection Worksheets

Line 3D - Travel Costs

Purpose	Functional Area	Location			FRN	Price Current	Inflate	Prorate	Base Year Cost
		School	Bldg. #	Room					
Giessen ES									
Conference Travel	Giessen Elementary School	GES	6302	101	N	08/19/04	Y	Y	$1,345
								TOTAL	$1,345

Sample Data Collection Worksheets

Line 3E - MEO Subcontract Costs

Contractor Name	Functional Area	Location	GFP	Industry Code	Existing	Inflate	Prorate	CME	Contract Price
Giessen ES									
Adtech Inc.	Scientific & Tech Consultation	Giessen, Germany	N	541690	N	Y	Y	2	$96,272
Adminastaff LLP	Office Administrative Services	Giessen, Germany	N	561110	N	Y	Y	4	$67,981
BOS GmbH	Janitorial Services	Giessen, Germany	N	12/07/37	N	Y	Y	12	$145,098
								TOTAL	$309,351

Sample Data Collection Worksheets

Line 3F - Utilities Costs

Type of Utility	Functional Area	Location	FRN	GFP	Unit kw/hrs	Unit Price	Price Current	Inflate	Quantity Required
Electricity	Giessen Elementary School	Giessen, GE	N	N	895,987	$0.09	12/22/04	Y	$80,639
								TOTAL	$80,639

Note: Utilities are provided by the German Utilities Company

Sample Data Collection Worksheets

Line 3G - Other Costs

Item Name	Functional Area	Location	FRN	Price Current	Prorate	Inflate	Base Year Cost
Audio Visual Support	Auditorium	Giessen, GE	N	06/12/04	Y	O&M	$6,500
						TOTAL	$6,500

Sample Data Collection Worksheets

Line 5 - Additional Costs

Item Name	Functional Area	Location	FRN	Price Current	Inflate	Prorate	Inflation Factor	Base Year Cost
Replace Flagpole	Elementary School	Giessen, GE	N	06/12/04	Y	Y	O&M	$1,200
							TOTAL	$1,200

Cost Data & Systems

- **Necessary for determining baseline costs**
  - COMPARE programming
- **Collection system linked to COMPARE line entries**
- **Training a must**
- **Maintain (safeguard) data**

Project Plan

Project Plan

- **Preliminary Planning <u>Project Plan</u>**
  - Living document
  - Why is it needed?
    - Effective management
    - Standardization
    - Maximize resources
  - Key elements:
    - Goals
    - <u>Initial</u> scope
    - Teams

Project Plan

- Roles and responsibilities
- Milestones
- Responsibility Assignment Matrix (RAM)
- Communication plan (internal & external)
- Other components?
  - Sheppard project plan

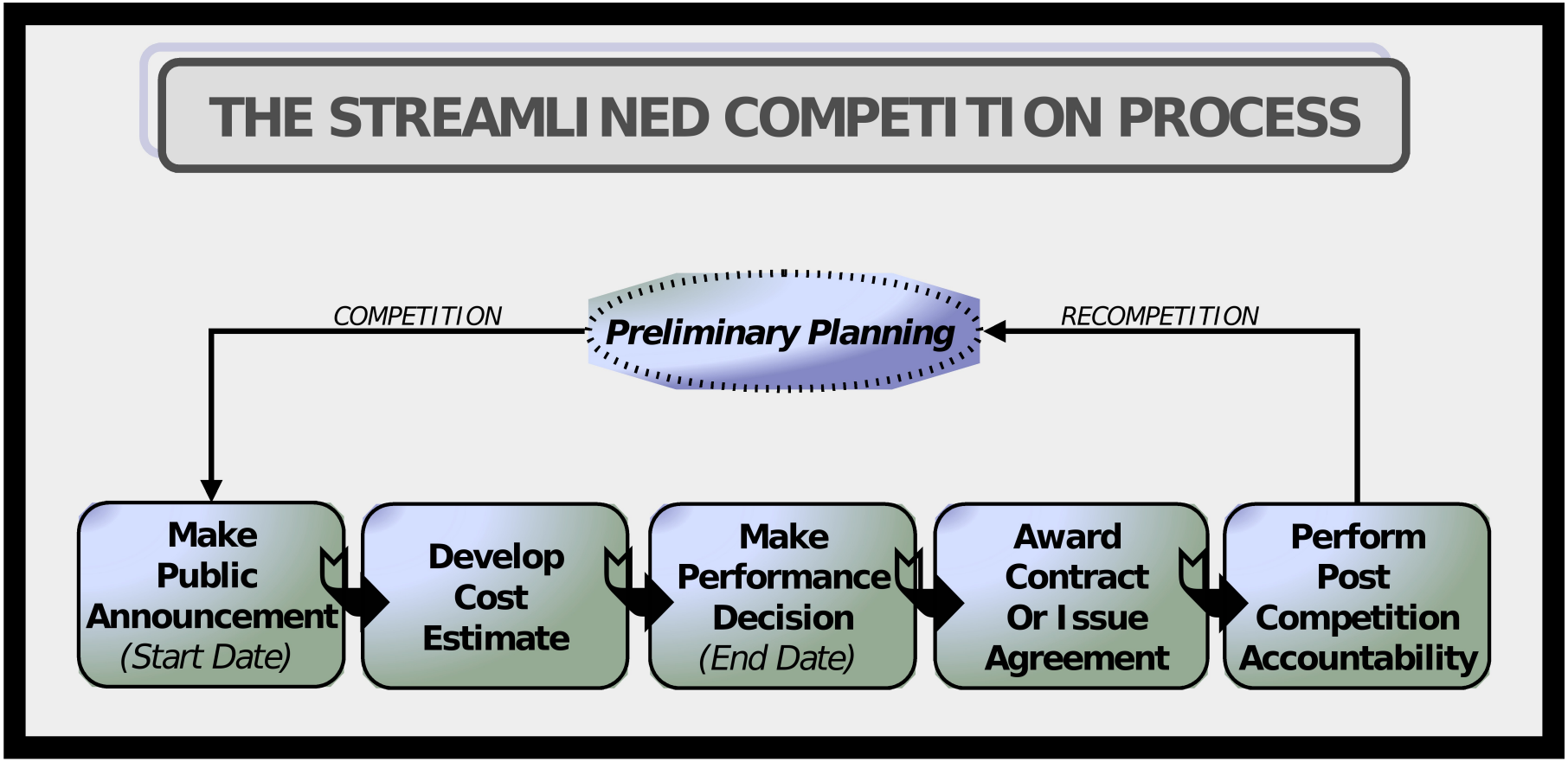
Project Plan

- Required to effectively manage the Preliminary Planning process
- Tailor to meet your needs
- A living document

J I C O
Case Study

Type of Competition

Type of Competition Streamlined



Streamlined Competition Rules are Still Fuzzy

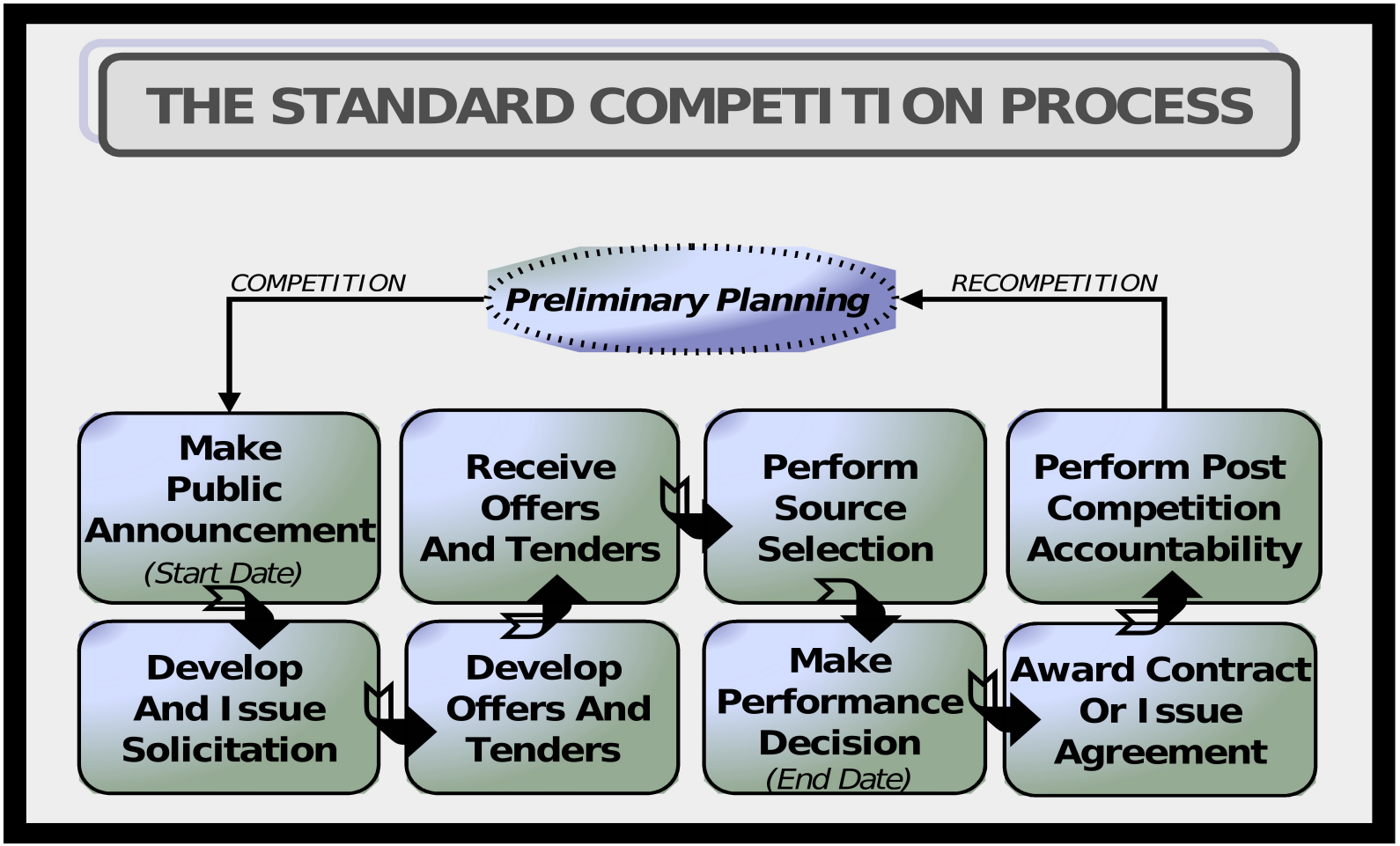
- **Size**: Choice to use streamlined or standard below 65 FTEs
  - DOD Law
    - No difference from OMB if award made to JWOD or NAO
    - 10 or fewer FTEs – can do cost comparison
    - 11 to 65 FTE but must have an MEO, PWS, and 10%/ $10M
      - >50 FTE Report to Congress
- **Timeline**: 90 -135 days
  - 135 day waiver if MEO is developed or solicitation issued. CCSO grants waiver before public announcement
  - Study ends when performance decision is made

Streamlined Competition Rules are Still Fuzzy

- Elements: Compares Gov't to Market Research

- Protest: If a solicitation is not released, then GAO will not review protest. No "contests" according to circular

Type of Competition Standard



Standard Competition Rules are Still Fuzzy

- **Size**: Can use standard at any size
  - Must use if more than 65 FTEs
    - Must have MEO with more than 10 FTEs, 10%/10M delta, & report to Congress >50 FTEs
    - if NAO or JWOD 10%/10M delta N/A
- **Timeline**: 12 to 18 months
- **Protest**: MEO can protest to GAO
  - MEO "contest" to agency level only if >65 FTEs
  - Private sector to agency and GAO

Schedule

Schedule

- Standard or streamlined competition
- Public announcement to full contract start
- Why is scheduling important?
  - Good management tool
    - ID critical milestones
    - Meet crucial process steps
    - Complete study within time limits
    - Flexibility

Schedule

- Keys to an effective schedule:
  - ID all *major steps/milestones for each phase of the competition process
  - ID sub-steps/ milestones, as required

Milestone	Start Date	Completion Date
*Develop PWS		
Publish Draft		
Publish Final		

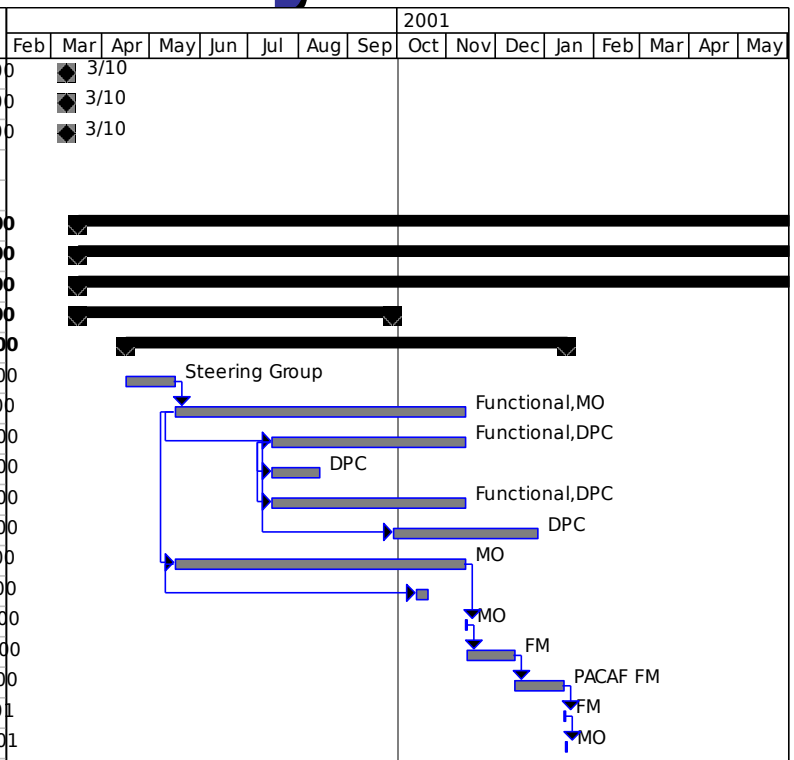
Standard Competition Phase	Notes
Public Announcement	Official Study Start (OMB)
Develop & Issue Solicit.	
Develop Offers & Tenders	
Receive Offers & Tenders	
Perform Source Selection	
Performance Decision	Official Study End (OMB)
Award Contract	
Post Comp	

Schedule

- **Tools**
  - ©Microsoft Project
  - Excel
  - What else?
- **Examples**

Schedule Microsoft Project

ID	Task Name	Start
1	Link to PACAF CS&P Web Page	Fri 3/10/00
2	Link to AFCQMI CS&P Web Page	Fri 3/10/00
3	Link to HQ USAF CS&P Web Page	Fri 3/10/00
4		
5		
6	**The A-76 Process**	**Fri 3/17/00**
7	**Announcement to Tentative Decision**	**Fri 3/17/00**
8	**Initial study actions**	**Fri 3/17/00**
68	**SOW Development**	**Fri 3/17/00**
75	**Management Plan Development**	**Sun 4/16/00**
76	Establish an MEO Team	Sun 4/16/00
77	Develop MEO/Transition Plan/TPP	Tue 5/16/00
78	Finalize duties, classify and grade position descript	Sat 7/15/00
79	Conduct Labor Market Analysis	Sat 7/15/00
80	Develop PD for Contract Administration Position(s)	Sat 7/15/00
81	Conduct Mock RIF	Thu 9/28/00
82	Develop In house Bid using COMPARE	Tue 5/16/00
83	PACAF provides refresher training and assists with	Fri 10/13/00
84	Forward cost estimate to IRO	Sun 11/12/00
85	Complete Independent Review and forward to PA	Mon 11/13/00
86	PACAF/FM completes Independent Review	Wed 12/13/00
87	Base FM forwards CCF to MO	Fri 1/12/01
88	Submit the Management Plan to base contracting	Sat 1/13/01
89	**Contracting Actions**	**Fri 3/17/00**
97	**Cost Comparison Actions**	**Mon 10/23/00**
107	**Public Review Period**	Tue 7/24/01
108	**Appeals Process (If applicable)**	**Tue 7/24/01**
129	**Final Cost Comparison Decision**	Tue 9/11/01
130	**For contract decisions**	**Sat 7/14/01**
148	**For in-house decisions**	**Sat 7/14/01**



Schedule Excel Spreadsheet

DEVELOP AND ISSUE SOLICITATION						
MILESTONES	**POC/OPR**	**DAYS TO COMPLETE**	**START DATE**	**COMPLETION DATE**	**PERCENTAGE COMPLETED**	**COMMENTS**
Synopsize procurement in *FedBizOpps.gov*						
Develop PWS/QASP						
Publish Draft PWS						
Publish Final PWS						
Prepare/Issue RFP						

DEVELOP AGENCY TENDER						
MILESTONES	**POC/OPR**	**DAYS TO COMPLETE**	**START DATE**	**COMPLETION DATE**	**PERCENTAGE COMPLETED**	**COMMENTS**
Develop MEO						
Develop QCP						
Develop Agency Cost Estimate						

Schedule

- Critical in managing the competition
- Setup schedule to include the entire process
- Pick a tool and go with it!

Roles & Responsibilities of Participants

Roles and Responsibilities

- **What are some roles and responsibilities for the following key participants?**
  - Manpower
  - Contracting
  - Civilian Personnel (HR)
  - Functional representatives
  - Finance
  - Legal
  - Public Affairs

Roles and Responsibilities

- **Manpower/Program Manager:**
  - Completed scoping, grouping, set-up data collection system, and baseline costs
  - Participate on PWS team and MEO team
  - Key member of costing team
  - Overall management
- **Contracting:**
  - Completed market research and analysis of CME's.
  - Participate on PWS team and major responsibility for releasing the RFP and source selection

Roles and Responsibilities

- **Human Resources**
  - Complete preliminary labor market research
  - Assist MEO and Costing Teams
  - Interface with affected civilian employees

- **Functional Representatives**
  - Complete baseline costing
  - Assist in MR and PLMR (position descriptions and SON)
  - Participate on PWS team and MEO team and Costing Team

Roles and Responsibilities

- **Finance**
  - Perform Cost/Benefit Analysis
  - Budgeting
  - Certify funding
- **Legal**
  - Ethics training as soon as possible
  - Advisory agent and legal guidance
- **Public Affairs**
  - Rumor control

Roles and Responsibilities

- Important to understand everyone's roles and responsibilities
- Hold steering group meetings
- Avoid Organizational Conflict of Interest with firewalls and understanding
  - a little more about conflict of interest….

Roles and Responsibilities

- Is it a conflict of interest to work on preliminary planning and then work on the MEO? FAR says to prevent…
  - Conflicting roles that might bias judgment
  - Unfair competitive advantage caused by possession of source selection information not available to all competitors.

Roles and Responsibilities
Setting up the firewall

- The Preliminary Planning Team
  - Manpower Analysts
  - Functional Reps
  - Contracting
  - Human Resources
  - Public Affairs
  - Legal
  - Finance

- The MEO Team
  - Manpower Analysts
  - Functional Reps
  - Human Resources
  - Contracting
  - Legal

- The PWS/Source Selection Team
  - Manpower Analysts
  - Contracting
  - Functional Reps
  - Finance
  - Legal
  - Public Affairs

Roles and Responsibilities

- **Procurement Integrity Rules** – Can you get a job with the contractor if you were working on the PWS or source selection?
  - Law prohibits an employee from participating "personally and substantially" in a matter that affects the financial interest of a company and then seeking employment with that company
  - FAR 3.104 Procurement Integrity

Roles and Responsibilities

- Generally an individual will not be considered to have participated *"Personally and Substantially"* by participating in the following:
  - Agency-level boards, panels, or other advisory committees that review program milestones or evaluate and make recommendations regarding alternative technologies or approaches for satisfying broad agency-level missions or objectives
  - The performance of general, technical, engineering, or scientific effort having broad application not directly associated with a particular procurement
  - A-76 support efforts are not considered personal and substantial by participating in the development of In-house cost estimates, MEO Prep, and Tech support for PWS

Roles and Responsibilities

Therefore, most employees who could potentially lose their jobs to a contractor are covered by the “Right of First Refusal”

-Adversely affected employees offered jobs for which they are qualified

-CO provides names to contractor 10-90 days after contract award

Competition Officials

Competition Officials

- **What are the roles, responsibilities, and requirements for the following competition officials?**
  - Agency Tender Official (ATO)
  - Contracting Officer (CO)
  - PWS team leader
  - Human Resource Advisor (HRA)
  - Source Selection Authority (SSA)

Competition Officials

- **Agency Tender Official (ATO):** Responsible for developing, certifying and representing the MEO's tender
  - "Vice President of Business Development"
  - Designates and trains the MEO team
  - Must be inherently governmental and an interested party

- **Contracting Officer (CO):** Member of the PWS team who should understand the FAR and the circular. Together with the PWS team leader, the CO helps develop the solicitation package.
  - Must be inherently governmental

Competition Officials

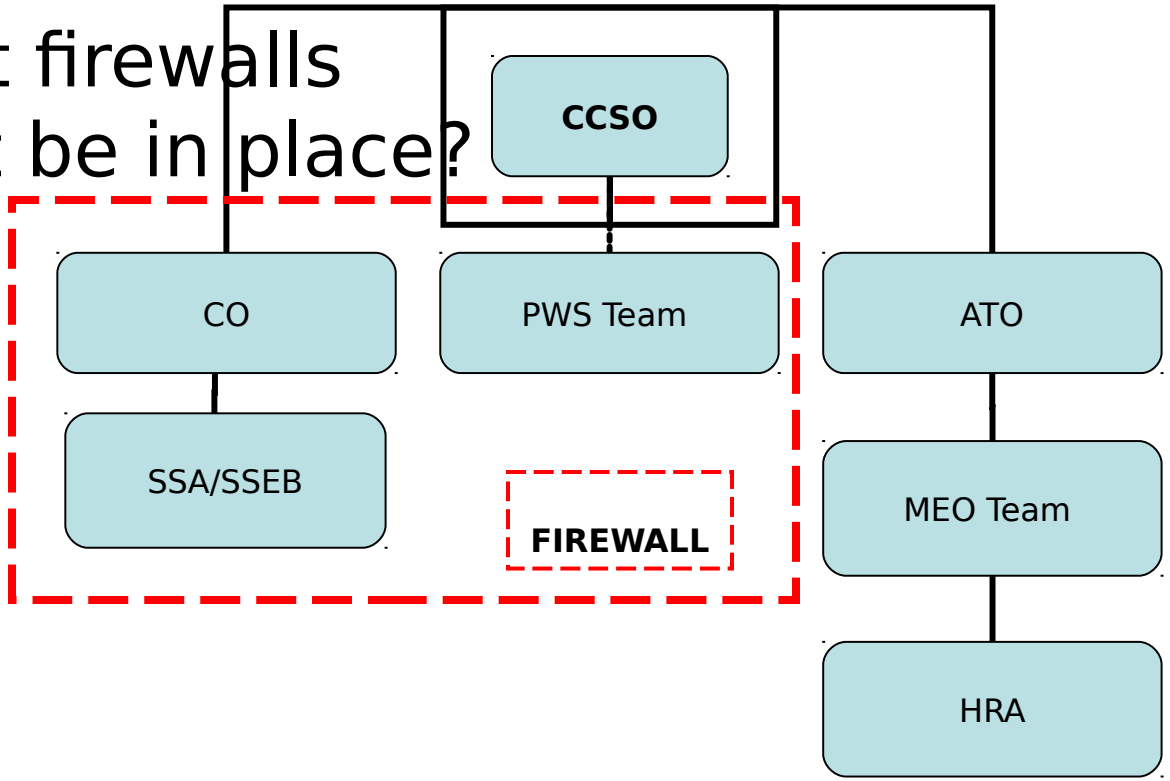
- **PWS Team Leader**: Develop the PWS and QASP; determine the GFE
  - Must be inherently governmental
  - Assist in solicitation development and implementation of performance decision

- **Human Resources Advisor**: Participate in MEO team for employee and labor relations requirements
  - Must be inherently governmental

- **Source Selection Authority**: Final decision authority for performance decision
  - Must be inherently governmental

Competition Officials

- What firewalls must be in place?



Competition Officials

- Again, important to understand the roles of the competition officials
- ID these officials early
- Ensure necessary firewalls are in place

Incumbent Service Providers

- **How do we treat the incumbent?**
  - Must notify incumbent of the planned competition before public announcement
  - Keep them informed
    - control those “Stephen King” rumors

Full Time Equivalent (FTE)

The staffing of federal civilian employee positions, expressed in terms of annual productive work hours (1,776) rather than annual available hours that includes non-productive hours (2,080). FTEs may reflect civilian positions that are not necessarily staffed at the time of public announcement and staffing of FTE positions may fluctuate during a streamlined or standard competition. The staffing and threshold FTE requirements stated in the circular reflect the workload performed by these FTE positions, not the workload performed by actual government personnel. FTEs do not include military, uniformed services, or contract support.